



1/20

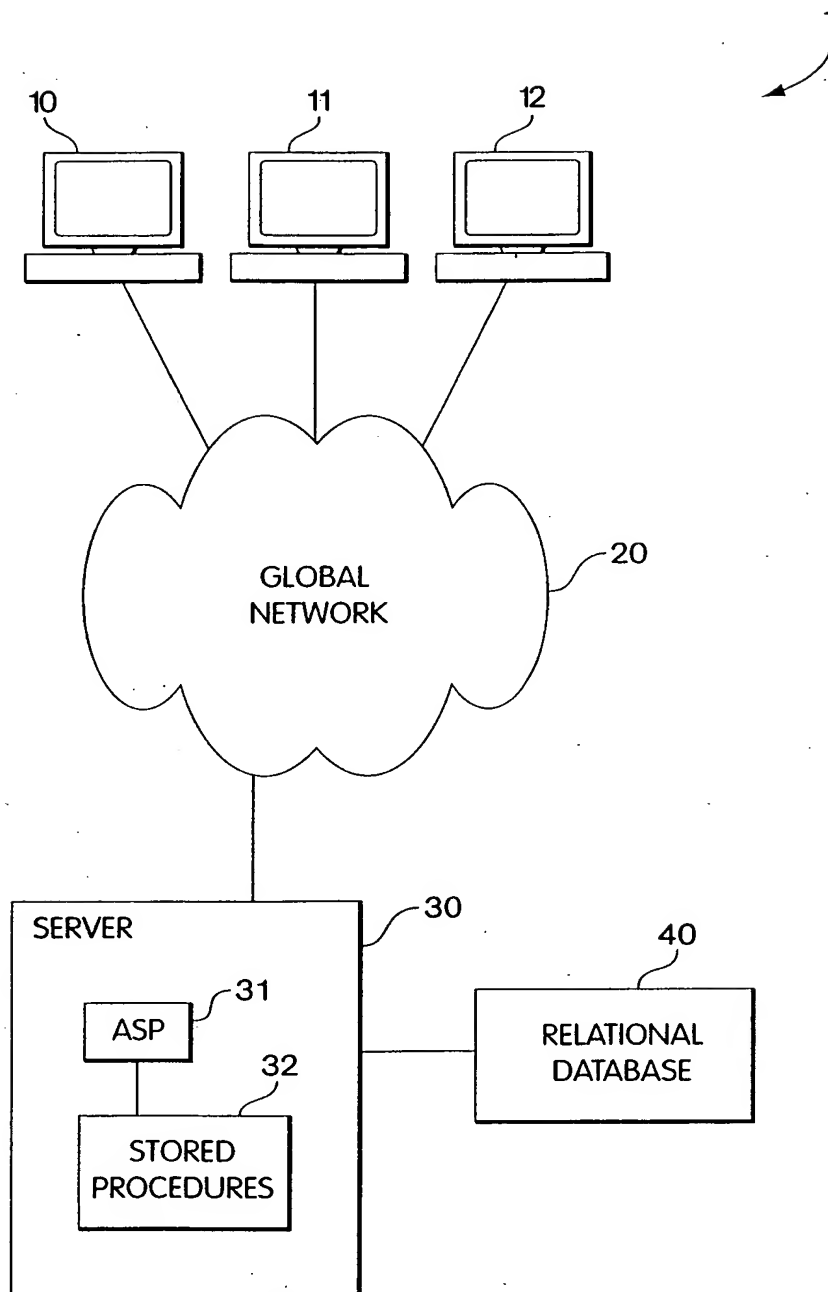


Fig. 1

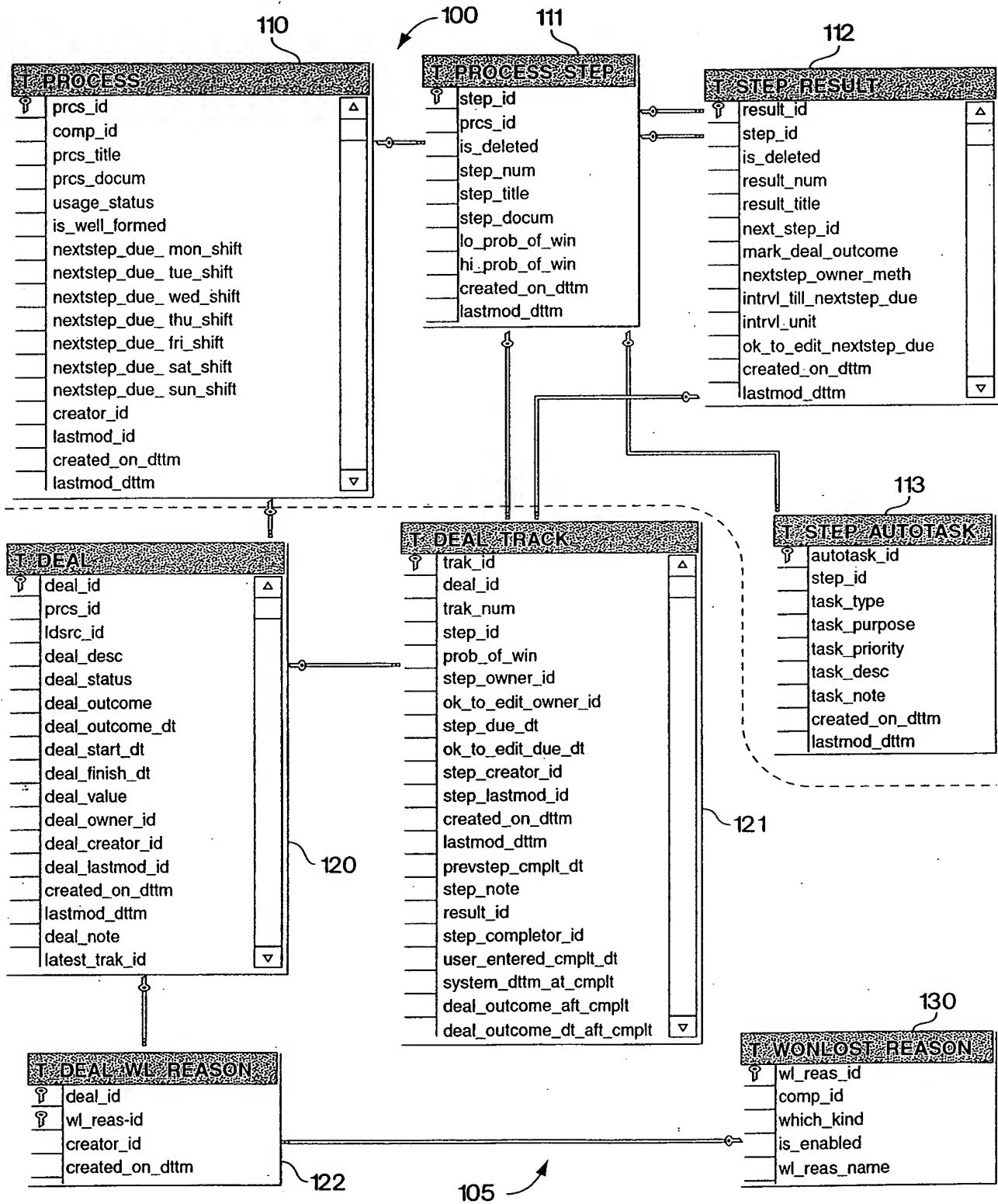


Fig. 2

3/20

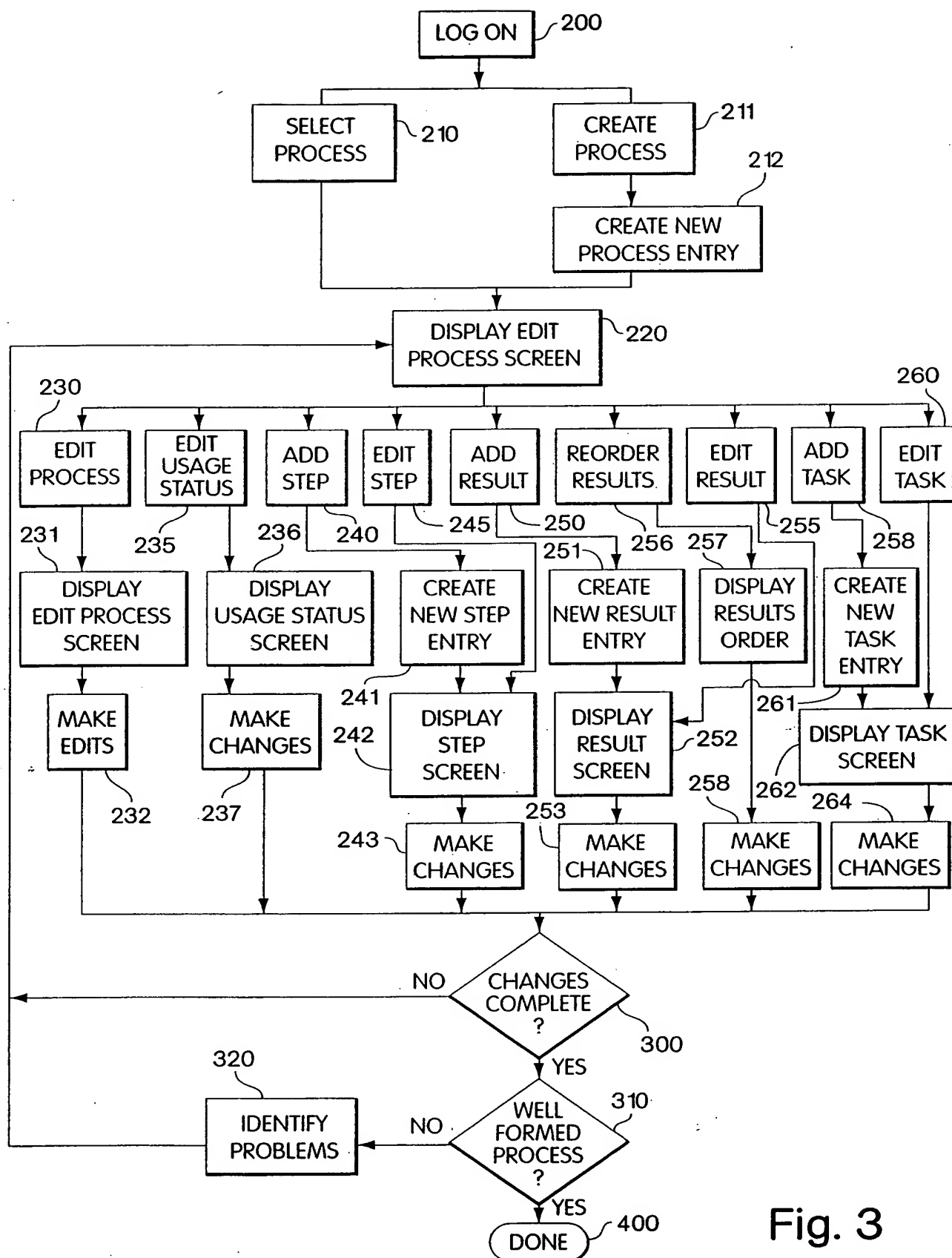


Fig. 3

511 ② **Setup : Process Builder - Edit**
 Process Name: Inbound Call (Edit) (A)
 512 Usage Status: Active (Change) (B)

©

522

Add Step

Print View

Copy Process

500

510

Step 1: Qualify (0% - 10%)

520 Results(reorder)
 530 Qualified (F) 535
 532 Not Qualified
 533 Already asked to buy

540 Auto Tasks

541 Research company financials (E)

Step 2: Contact Prospect (0% - 0%)

521 Results(reorder)
Phoned - set up demo
Phoned - left message
Faxed
Emailed

Step 3: Schedule Demo (10% - 40%)

Results(reorder)
Scheduled it
Prospect decided not to continue

Auto Tasks

Check prospect's availability

Step 4: Give Demo (50% - 50%)

Results(reorder)
Gave demo - interested
Gave demo - not interested
Demo postponed

Step 5: Close Deal (100% - 100%)

Results(reorder)
Won Deal
Lost Deal

Step 6: Fill out win/loss report (won) (100% - 100%)

Results(reorder)
Done
Not Done

Step 7: Fill out win/loss report (loss) (100% - 100%)

Results(reorder)
Done
Not Done

536 (F) Add Result | Add Auto Task (E)

| Goto | Next Step Due | Next Step Owner |
|----------|-----------------|------------------------|
| ↘ 2 | [1 week, Adj] | [User Delegated] |
| Lost ↘ 7 | [1 week, Adj] | [Current Step Owner] |
| Won ↘ 6 | [1 week, Adj] | [Current Step Owner] |

Task Type**Task Purpose**

Qualify

Add Result | Add Auto Task

| Goto | Next Step Due | Next Step Owner |
|------|------------------|------------------------|
| ↘ 4 | [2 weeks, Adj] | [Current Step Owner] |
| ↻ | [3 days, Adj] | [Current Step Owner] |
| ↻ | [3 days, Adj] | [Current Step Owner] |
| ↘ 3 | [4 days, Adj] | [Current Step Owner] |

Add Result | Add Auto Task

| Goto | Next Step Due | Next Step Owner |
|----------|------------------|------------------------|
| ↘ 4 | [2 weeks, Adj] | [User Delegated] |
| Lost ↘ 7 | [1 week, Adj] | [Current Step Owner] |

Task Type**Task Purpose**

Phone Call

Add Result | Add Auto Task

| Goto | Next Step Due | Next Step Owner |
|----------|------------------|------------------------|
| ↘ 5 | [2 weeks, Adj] | [User Delegated] |
| Lost ↘ 7 | [1 week, Adj] | [Current Step Owner] |
| ↻ | [2 weeks, Adj] | [User Delegated] |

Add Result | Add Auto Task

| Goto | Next Step Due | Next Step Owner |
|----------|-----------------|------------------------|
| Won ↘ 6 | [1 week, Adj] | [Current Step Owner] |
| Lost ↘ 7 | [1 week, Adj] | [Current Step Owner] |

Add Result | Add Auto Task

| Goto | Next Step Due | Next Step Owner |
|-------|-----------------|------------------------|
| Won ↘ | [Finished] | |
| ↻ | [1 week, Adj] | [Current Step Owner] |

Add Result | Add Auto Task

| Goto | Next Step Due | Next Step Owner |
|--------|-----------------|------------------------|
| Lost ↘ | [Finished] | |
| ↻ | [1 week, Adj] | [Current Step Owner] |

Fig. 4A

Salesnet - Microsoft Internet Explorer

?

Setup : Process Builder - Process Properties

Process Properties

Process Name:Inbound Call

Process Description:To handle all incoming calls

Business Day Shifting

Monday:None

Tuesday:None

Wednesday:None

Thursday:None

Friday:None

Saturday:+Mon

Sunday:+Mon

Save

Cancel

Fig. 4B

Salesnet - Microsoft Internet Explorer

Change Process Usage Status

Process Name: **Inbound Call**

Current Usage Status: **Active**

New Usage Status:

☐ Inactive

☒ **Under Construction**

Save **Cancel**

Fig. 4C

Salesnet - Microsoft Internet Explorer

Delete

? Edit Step

* Step Name:

* Step Description:

Due Diligence to see if prospect meets our criteria for a potential sale.

* Probability of Winning: Low % High %

Display Position: ▾

☐ Save and Add another Step

☒ Save and Return to Process

Fig. 4D

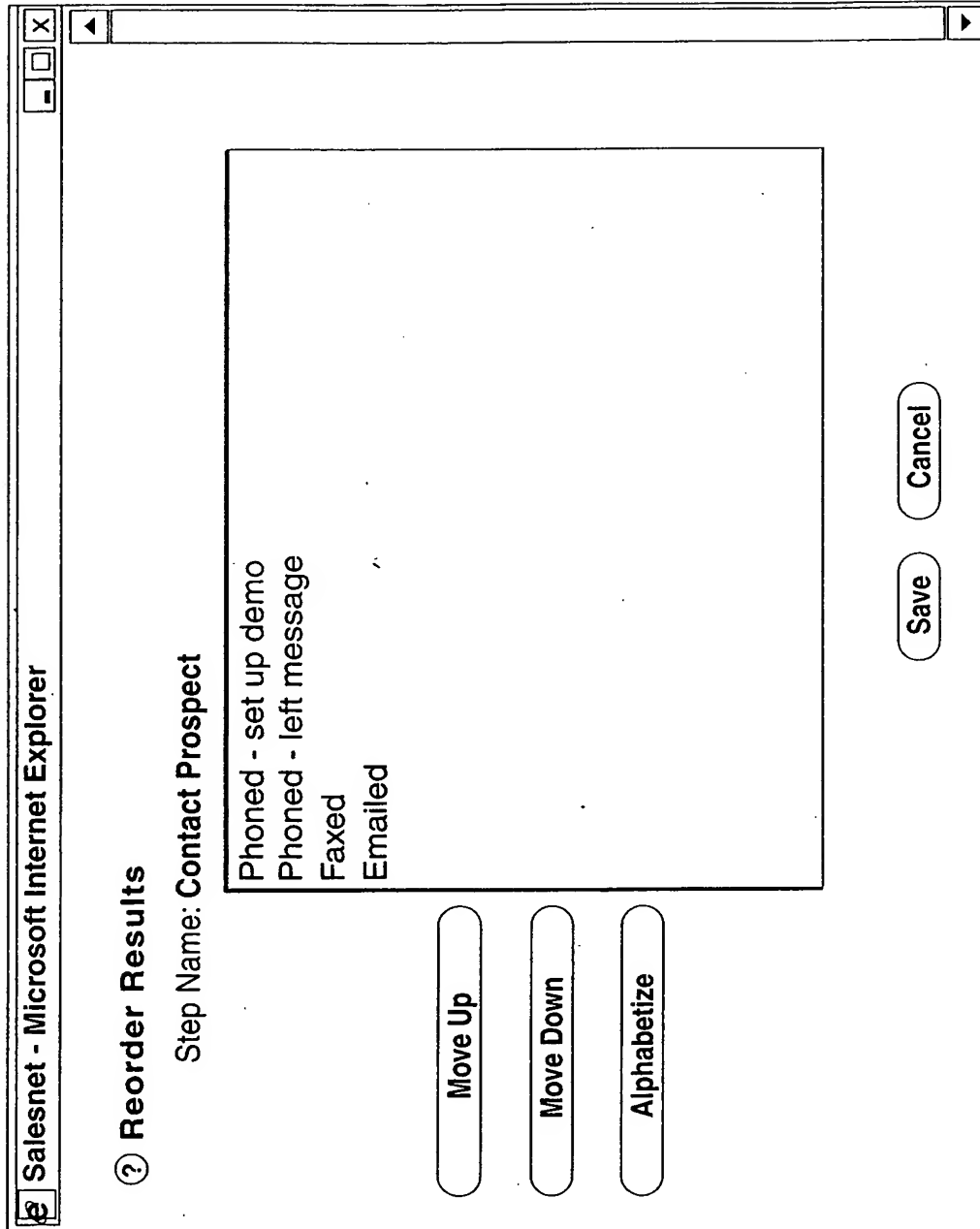


Fig. 4E

Salesnet - Microsoft Internet Explorer

Edit Auto Task

*** Task Description:**

Task Type:

Task Purpose:

Task Priority: ☒ Normal ☐ High

Task Note:

☐ Save and Add another Auto Task

☒ Save and Return to Process Builder

Fig. 4F

Salesnet - Microsoft Internet Explorer

Delete

? Edit Result
Step 1: Qualify

*Result Name:

Navigation: ☒ Go to Step

☐ Mark Deal as Finished

Deal Outcome: ☒ Mark the Deal as Won
☐ Mark the Deal as Lost

Time Interval: ☒ Allow User to Modify Due Date
(From this Step's Completion Date until the next Step's Due Date)

Next Step Owner: ☒ Owner of the Current Deal Step
☐ Owner of the Deal
☐ Allow User to Delegate the Next Step Owner

☐ Save and Add Another Result
☒ Save and Return to Process Builder

Fig. 4G

⓪ Setup : Won/Lost Reason Codes

| Reasons for Won Deals | | | Add |
|-----------------------|------------|----------|--------|
| | | Reason | Status |
| <u>Edit</u> | <u>Del</u> | Faster | Active |
| <u>Edit</u> | <u>Del</u> | Smarter | Active |
| <u>Edit</u> | <u>Del</u> | Stronger | Active |

| Reasons for Lost Deals | | | Add |
|------------------------|------------|------------------------------------|--------|
| | | Reason | Status |
| <u>Edit</u> | <u>Del</u> | Decided not to commit at this time | Active |
| <u>Edit</u> | <u>Del</u> | Went with competitor | Active |

Fig. 4H

Salesnet - Microsoft Internet Explorer

Edit Won Reason Code

Description:

Status: ☒ Active ☐ Inactive

☐ Save and Add another Reason Code

☐ Save and Return to setup page

☒ Save and Return to Reason Code list

Fig. 4I

② Setup : Activity Types and Purposes

| Activity Types | | | Add |
|----------------|------------|------------|--------|
| | | Types | Status |
| <u>Edit</u> | <u>Del</u> | Email | Active |
| <u>Edit</u> | <u>Del</u> | Fax | Active |
| <u>Edit</u> | <u>Del</u> | Letter | Active |
| <u>Edit</u> | <u>Del</u> | Phone Call | Active |

| Activity Purposes | | | Add |
|-------------------|------------|----------|--------|
| | | Purposes | Status |
| <u>Edit</u> | <u>Del</u> | Qualify | Active |
| <u>Edit</u> | <u>Del</u> | Whatever | Active |

Fig. 4J

Salesnet - Microsoft Internet Explorer

Edit Activity Type

Description:

Status: ☒ Active ☐ Inactive

☐ Save and Add another Type

☐ Save and Return to setup page

☒ Save and Return to List

Save **Cancel**

Fig. 4K

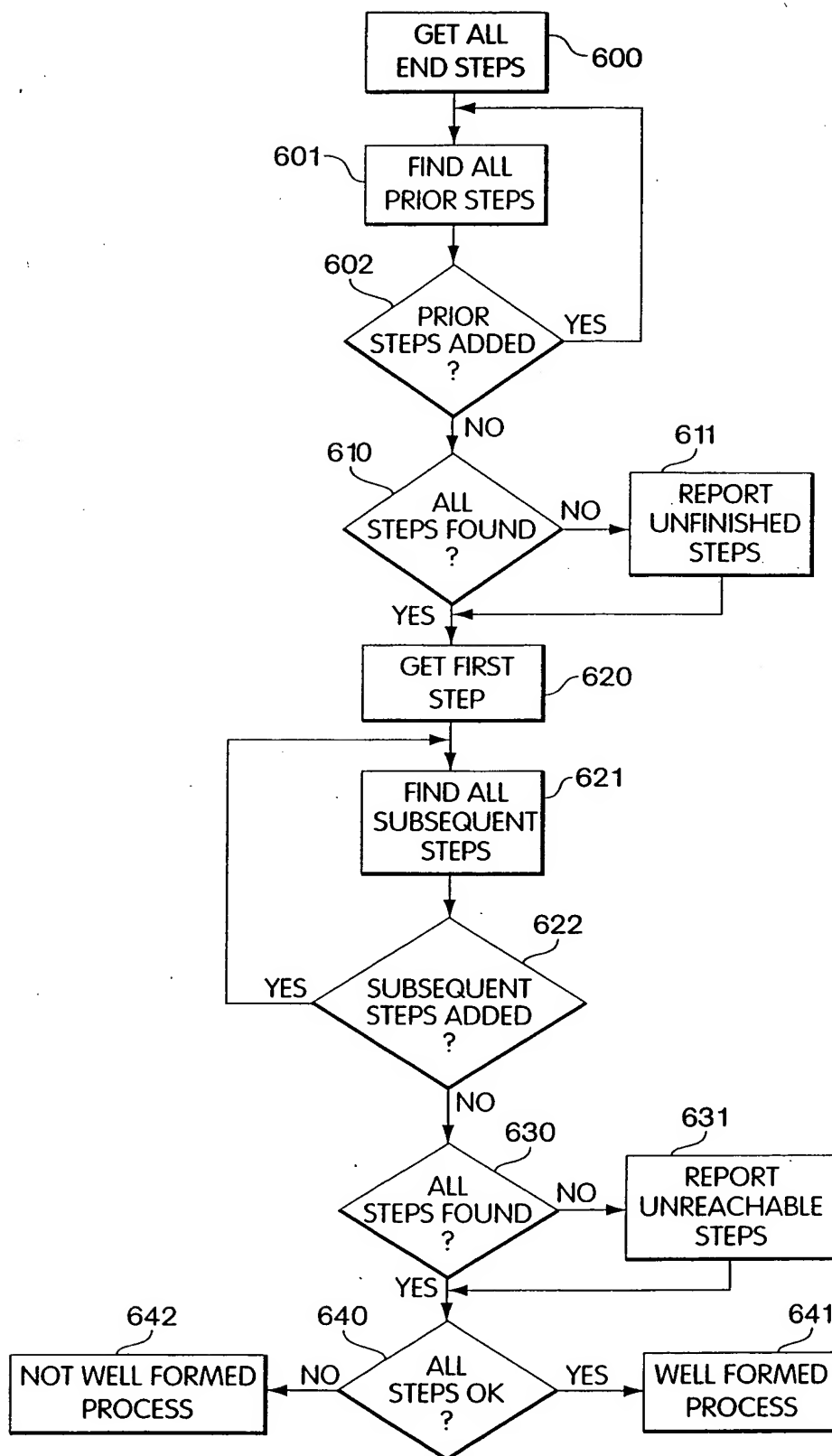


Fig. 5

700

ACCOUNTS
CONTACTS
DEALS
DEAL DETAIL
DEAL STEPS

② El Coloso Deal (#01) (This Deal is Open)

Process: Inbound Call

Primary Contact: Jacob Abbo, 507-271-0555

721

Complete Current Step

Edit Current Step 722

Current Step Detail

Step Name: Close Deal Step Owner: O'Connell, Diane

Step Due: 02/14/2001 Step Prob: 100 %

Step Notes:

Deal History

| | | Completed | Step | Result | Completed By | Prob. | Deal Outcome |
|---|------|------------|------------------|------------------------|------------------|-------|--------------|
| edit | undo | 02/07/2001 | Give Demo | Gave demo - Interested | O'Connell, Diane | 50% | |
| 732 The demo went well. I was informed that a decision should be made by next week. | | | | | | | |
| edit | undo | 01/31/2001 | Contact Prospect | Phoned - set up demo | O'Connell, Diane | 0% | |
| Will give demo to 5 decision-makers at their offices | | | | | | | |
| edit | undo | 01/24/2001 | Contact Prospect | Phoned - left message | O'Connell, Diane | 0% | |
| edit | undo | 01/17/2001 | Qualify | Qualified | O'Connell, Diane | 10% | |

730

731

Fig. 6A

740

ACCOUNTS

CONTACTS

② El Coloso Deal (#01)

Process: Inbound Call

Primary Contact: Jacob Abbott

Current Step Detail

Step Name: Close Deal

Step Due: 02/14/2001

Step Notes:

Deal History

| | Completed |
|-------------------------|---------------|
| <u>edit</u> <u>undo</u> | 02/07/2001 |
| | The demo was |
| <u>edit</u> <u>undo</u> | 01/31/2001 |
| | Will give dem |
| <u>edit</u> <u>undo</u> | 01/24/2001 |
| <u>edit</u> <u>undo</u> | 01/17/2001 |

Salesnet - Microsoft Internet Explorer

Complete Current Step

Deal: El Coloso Deal (#01) (This Deal is Open)

Current Step: Close Deal Current Step Owner: O'Connell, Diane

Step Completion Date: 02/15/2001

Step Result: Won Deal 742

Notes:

Next Step Detail

Next Step: Fill out win/loss report (won) Owner of Next Step: O'Connell, Diane

Due Date of Next Step: 02/22/2001 Probability of Winning: 100 %

The Deal Outcome will be 'Won'

Select one or more reasons, if applicable:

Faster

Smarter

Stronger

Save

Cancel

741

Notes

745

Fig. 6B

Fig. 6C

ACCOUNTS CONTACTS DEALS DEAL DETAIL DEAL STEPS

② El Coloso Deal (#01) (This Deal is Open)

Process: Inbound Call
Primary Contact: Jacob Abbo, 507-271-0555

Current Step Detail

Step Name: Close Deal
Step Due: 02/14/2001
Step Notes:

Deal History

| | Completed | Step | Deal Outcome |
|---|------------|------------------|--------------|
| <u>edit</u> | 02/15/2001 | Close Deal | Won |
| <u>edit</u> | 02/07/2001 | Give Demo | 50% |
| The demo went well. I was informed that a decision should be made by next week. | | | |
| <u>edit</u> | 01/31/2001 | Contact Prospect | 0% |
| Will give demo to 5 decision-makers at their offices | | | |
| <u>edit</u> | 01/24/2001 | Contact Prospect | 0% |
| <u>edit</u> | 01/17/2001 | Qualify | 10% |

Hide Notes

Salesnet - Microsoft Internet Explorer

Undo Confirmation
This will make Close Deal the current step. Any information you logged for this step will be deleted.

OK Cancel

Fig. 6D

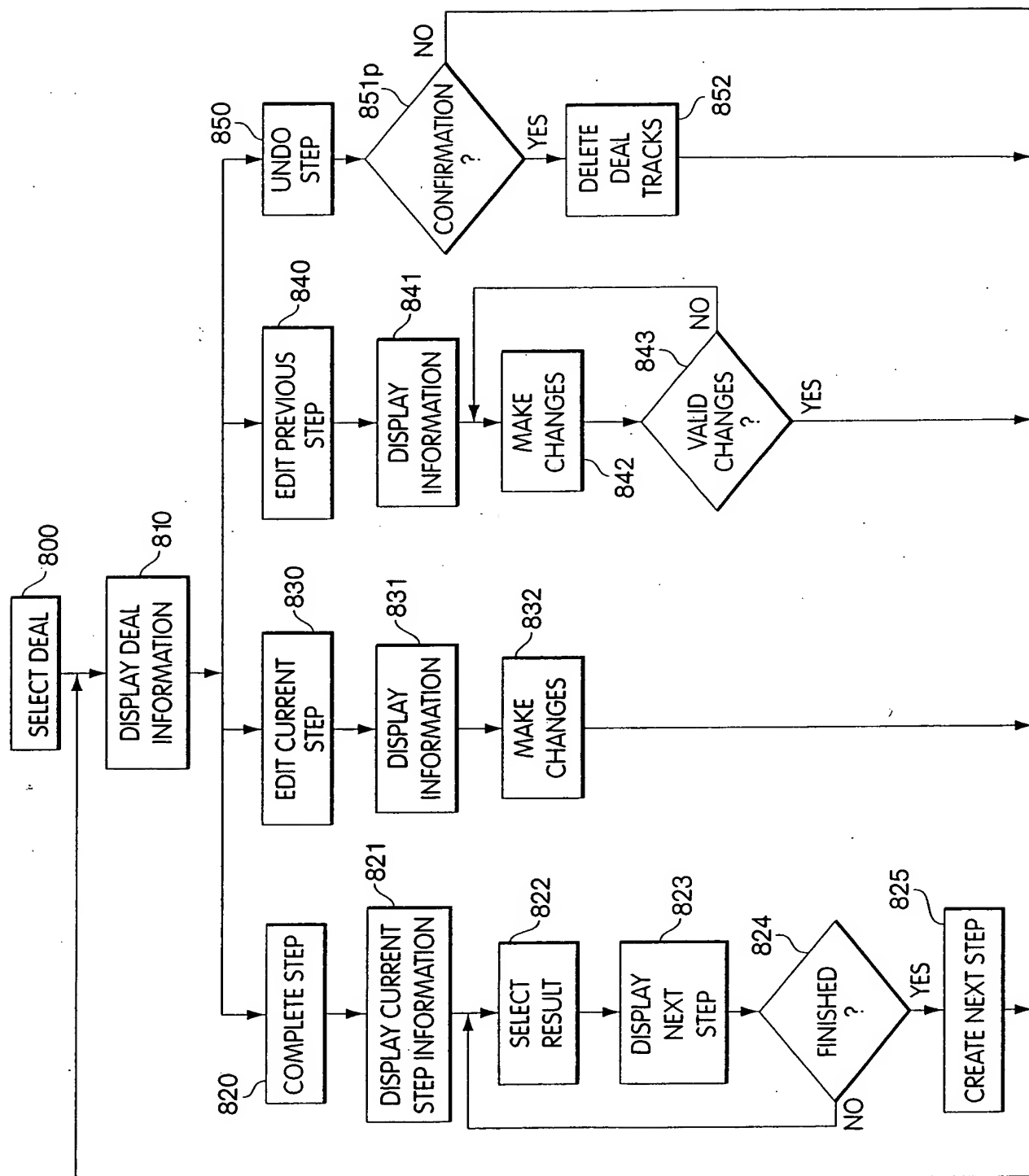


Fig. 7